

U.S. Department of Commerce
International Trade Administration



Office of Travel and Tourism Industries

2012 Market Profile: Europe



2012 Market Profile: Europe

Visitation Trends (Arrivals)

[Thousands of Visitors]	2005	2006	2007	2008	2009	2010	2011	2012	Change 2012/2005
Total Arrivals	10,313	10,136	11,406	12,783	11,550	11,985	12,660	12,478	2,166
Percentage Change (%)	6	-2	13	12	-10	4	6	-1	21

Spending Trends (Exports)

[Millions of U.S. Dollars]	2005	2006	2007	2008	2009	2010	2011	2012	Change 2012/2005
Total Travel & Tourism Exports (1)	\$34,420	\$34,289	\$39,682	\$49,597	\$38,030	\$38,381	\$43,066	\$45,723	\$11,303
Travel Receipts	\$27,395	\$27,603	\$31,759	\$38,515	\$29,552	\$29,451	\$32,400	\$34,868	\$7,473
Passenger Fare Receipts	\$7,025	\$6,686	\$7,923	\$11,082	\$8,478	\$8,930	\$10,666	\$10,855	\$3,830
Change (%) in Total Exports	8	0	16	25	-23	1	12	6	33

Information Sources Used for Trip Planning

	Information Sources Used	2011 (Percent)	2012 (Percent)	Point Change (2)
	Airlines (Directly)	24	45	21.1
	Corporate Travel Dept.	6	13	6.4
	Travel Guide(s)	8	14	5.7
2012	Personal Recommendation (Friends/Rel)		23	
2011	Friends/Relatives	15		
2012	National/State/City Travel Office		7	
2011	Nat'l Govt. Tourist Ofc.	1		
2011	State/City Travel Ofc.	5		
2012	Tour Operator/Travel Club		9	
2011	Tour Company	4		
2012	Online Travel Agency (OTA)		34	
2012	Travel Agency Office		21	
2011	Travel Agency	30		
2012	Other		5	
2011	TV/Radio	1		
2011	Personal Computer	49		
2011	In-flight Info. Systems	2		
2011	Newspapers/Magazines	2		

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Main Purpose of Trip

	Main Purpose of Trip	2011 (Percent)	2012 (Percent)	Point Change (2)
	Convention/Conference/Trade Show	3	7	3.6
	Visit Friends/Relatives	22	17	-4.5
	Health Treatment	0.2	0.1	-0.1
	Religion/Pilgrimages	0.2	0.2	0.0
2012	Business		12	
2011	Business/Professional	15		
2012	Vacation/Holiday		59	
2011	Leisure/Rec./Holidays/Sightseeing	56		
2012	Education		4	
2011	Study/Teaching	3		
	Other	1	1	0.7

All Purposes of Trip

	Purpose of Trip	2011 (Percent)	2012 (Percent)	Point Change (2)
	Convention/Conference/Trade Show	5	9	3.5
	Visit Friends/Relatives	33	29	-4.3
	Health Treatment	0.4	0.4	0.0
	Religion/Pilgrimages	1	1	0.0
2012	Business		15	
2011	Business/Professional	18		
2012	Vacation/Holiday		70	
2011	Leisure/Rec./Holidays/Sightseeing	71		
2012	Education		6	
2011	Study/Teaching	4		
	Other	1	2	0.5
	NET PURPOSES OF TRIP:			
	Leisure & VFR	85	81	-3.4
	Business & Convention	21	22	0.2

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Transportation Used in the United States

	Transportation Types Used in United States	2011 (Percent)	2012 (Percent)	Point Change (2)
	Airlines in U.S.	22	28	6.0
	Bus between Cities	9	13	4.5
	City Subway/Tram/Bus	28	39	10.2
	Company or Private Auto	23	32	9.0
	Railroad between Cities	13	8	-5.8
	Motor Home/Camper	1	1	0.0
	Rented Auto	31	35	4.1
	Taxi/Cab/Limousine	42	39	-2.5
2012	Cruise Ship/River Boat 1+ Nights		5	
2012	Ferry/River Taxi/Short Scenic Cruise		14	
2012	Rented Bicycle/Motorcycle/Moped		3	

Select Traveler Characteristics

Traveler Characteristics	2011	2012	Change (2)
Advance Trip Decision Time (mean days)	111	112	0.6
Advance Trip Decision Time (median days)	90	90	0.0
Prepaid Package	14	14	-0.3
First International Trip to the U.S.	26	22	-4.8
Length of Stay in U.S. (mean nights)	17.1	15.8	-1.3
Length of Stay in U.S. (median nights)	10	10	0.0
Number of States Visited (% 1 state)	66	68	1.4
Average Number of States Visited	1.6	1.5	-0.1
Hotel/Motel (% 1+ nights)	77	79	1.4
Average # of Nights in Hotel/Motel	8.6	9.4	0.8
Travel Party Size (mean # of persons)	1.6	1.6	0.0
Gender: % Male (among adults)	53	54	1.0
Household Income (mean average)	\$98,400	\$108,588	\$10,188
Household Income (median average)	\$86,300	\$80,350	-\$5,950
Average Age: Female	39	40	0.6
Average Age: Male	43	42	-1.0

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Activity Participation While in the United States

	Activity Participation While in the U.S.	2011 (Percent)	2012 (Percent)	Point Change (2)
	Amusement/Theme Parks	29	25	-3.9
	Art Gallery/Museum	29	34	5.8
	Sporting Event	8	13	4.8
	Camping/Hiking	6	5	-0.1
	Casino/Gambling	11	11	-0.5
	Concert/Play/Musical	19	21	2.1
	Environ./Eco. Excursions	4	4	-0.6
	Golfing/Tennis	5	5	-0.1
	Guided Tours	18	27	8.3
	Hunting/Fishing	2	2	-0.2
	Nightclubs/Dancing	15	17	2.3
	Shopping	86	87	1.4
	Visit American Indian Communities	5	6	1.0
2012	Cultural / Ethnic Heritage Sites		18	
2011	Cultural Heritage Sites	31		
2011	Ethnic Heritage Sites	5		
2012	Experience Fine Dining		38	
2011	Dining in Restaurants	88		
2012	Sightseeing		79	
2011	Sightseeing in Cities	47		
2012	Snow Sports		1	
2011	Snow Skiing	1		
2012	Small Towns/Countryside		35	
2011	Visit Small Towns/Villages	29		
2011	Touring Countryside	23		
2012	National Parks/Monuments		41	
2011	Visit National Parks	25		
2012	Water Sports		9	
2011	Water Sports/Sunbathing	23		
2012	Visit Historical Locations		33	
2011	Visit Historical Places	49		
2012	Other		2	
2011	Cruises	6		
2011	Ranch Vacations	1		

2012 Market Profile: Europe

U.S. Destinations Visited (States, Cities, and Regions)

Visitation to U.S. Destinations/Regions (3)	Market Share 2011 (Percent)	Volume 2011 (000)	Market Share 2012 (Percent)	Volume 2012 (000)
REGIONS				
Middle Atlantic	43.1	5,456	42.8	5,341
South Atlantic	31.2	3,950	32.0	3,993
Pacific	22.1	2,798	20.8	2,596
Mountain	15.5	1,962	14.0	1,747
East North Central	7.0	886	7.1	886
New England	7.2	912	6.9	861
West South Central	5.6	709	5.7	711
Pacific Islands	1.6	203	2.1	262
STATES				
New York	39.3	4,975	39.2	4,892
Florida	21.1	2,671	21.4	2,670
California	20.7	2,621	19.4	2,421
Nevada	11.5	1,456	10.7	1,335
Massachusetts	5.6	709	5.6	699
Illinois	4.9	620	5.0	624
Pennsylvania	3.9	494	4.4	549
Arizona	4.4	557	4.3	537
Texas	4.2	532	4.3	537
New Jersey	3.7	468	3.0	374
Georgia	2.6	329	2.9	362
Colorado	2.0	253	**	**
CITY				
New York City	38.5	4,874	38.5	4,804
San Francisco	11.6	1,469	11.0	1,373
Orlando	10.7	1,355	10.8	1,348
Los Angeles	12.1	1,532	10.4	1,298
Las Vegas	11.2	1,418	10.3	1,285
Miami	8.3	1,051	8.4	1,048
Washington, DC	6.6	836	6.8	849
Boston	5.0	633	5.2	649
Chicago	4.7	595	4.8	599
Philadelphia	2.9	367	3.1	387
San Diego	3.0	380	2.8	349
Atlanta	2.2	279	**	**
Houston	**	**	2.1	262

- (1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incident to a foreign visit) + passenger fare receipts (fares paid to U.S. air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).
- (2) Percentage-point and percentage changes are based on non-rounded data.
- (3) Only census region, state, and city destinations having a sample size of 400 or more are displayed.
Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.
- (**) Estimate not shown due to sample size fewer than 400 for this year.

Note: Estimate not shown due to sample size fewer than 400 for this year. This profile shows only a portion of the 35 travel characteristics data in 2011 and the 37 items reported on international arrivals to the U.S. Additional information may be obtained for a fee.

To learn more, please visit our website: <http://tinet.ita.doc.gov/research/programs/ifs/index.html>

For a list of the states that comprise each census region, please visit: http://tinet.ita.doc.gov/outreachpages/census_regions.html

Interested in data for your destination? OTTI sells custom reports. To learn more, go to: <http://www.tinet.ita.doc.gov/research/programs/ifs/customized.html>

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis

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Survey of International Air Travelers

The Survey of International Air Travelers provides a level of detail and insight into the traveler characteristics and travel patterns of international visitors to and from the United States not found elsewhere. Responses are weighted with data from the Department of Homeland Security and the following thirty-five tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the Europe traveler who visits the United States.

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Interested in obtaining data for your organization?

OTTI collects, analyzes and disseminates international travel and tourism statistics from the U.S. Travel and Tourism Statistical System and produces visitation data tables, including a business and pleasure arrivals rate of change analysis and detailed region, country and port analyses.

To learn more, you are encouraged to visit:

<http://tinet.ita.doc.gov/research/programs/ifs/customized.html>

For OTTI programs of interest visit:

<http://www.tinet.ita.doc.gov/research/index.html>

- Summary of International Travel to the United States (I-94)
- U.S. International Air Traveler Statistics (I-92)
- Canadian Statistics
- Survey of International Air Travelers (SIAT)
- Forecast of International Arrivals to the United States
- U.S. Travel and Tourism Exports, Imports and the Balance of Trade
- U.S. Travel and Tourism Satellite Accounts
- Travel Trade Barometer

U.S. Department of Commerce

International Trade Administration
Manufacturing and Services
Office of Travel and Tourism Industries
1401 Constitution Ave, NW
Washington, D.C. 20230
Phone: (202) 482-0140
Fax: (202) 482-2887
otti@trade.gov

<http://tinet.ita.doc.gov>